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Foreign CROPS AND MARKETS

VOLUME 64 NUMBER 26

BRAZIL NUTS (Page 587)

DAIRY PRODUCTS (Page 589)

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UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

LATE NEWS

With regard to its cotton price support program, the Government of Pakistan has announced that up to June 13, 1952 almost 252,000 bales (of 500 pounds gross) had been tendered to the Government for purchase at the support prices since the program was begun at the end of April. Of this total, 243,000 bales had been classed, with 210,000 bales approved and 33,000 bales rejected.

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The Government of Pakistan has announced that, since the support prices for Desi cotton are slightly higher than the world price for this type of cotton, it will permit the export of Desi at prices reasonably below the support level. The Government will make up the difference between the actual export sale price and the support price.

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FOREIGN CROPS AND MARKETS

Published weekly to inform producers, processors, distributors and consumers of farm products of current developments abroad in the crop and livestock industries, foreign trends in prices and consumption of farm products, and world agricultural trade. Circulation of this periodical is free to those persons in the U. S. needing the information it contains in farming, business and professional operations. Issued by the Office of Foreign Agricultural Relations of the U. S. Department of Agriculture, Washington 25, D. C.

1952 BRAZIL NUT PRODUCTION FORECAST LOWER

The 1952 preliminary forecast of Brazil nut production has been revised downward to 17,000 short tons, unshelled basis, compared with 34,100 tons (revised) in 1951 and 23,400 tons in 1950. The present forecast is 15 percent below the 10-year (1941-50) average of 19,900 tons and 37 percent below the 5-year (1946-50) average of 27,100 tons. It is now forecast that about 11,000 short tons will be collected in Belem; 5,700 tons in Manaus and the balance in Itacoatiara and Parintins. During 1951 the collections were: Belem 20,900 tons; Manaus 12,500 tons and the balance of 700 tons in Itacoatiara and Parintins.

If the harvest is not increased, this year's supply will be the smallest in the postwar period. Some members of the Trade believe that should a strong demand from the United States develop that the harvest could still reach 20,000 tons.

The small harvest has been attributed to a number of factors, chiefly lack of water in interior streams, poor set on trees, some scarcity of labor in a few regions and unwillingness of foreign buyers to pay profitable prices for the nuts. The normal collection season is rapidly drawing to a close which means that, aside from nuts still awaiting shipment in the interior, the year's supply is now about fixed. Arrivals of nuts each month at principal export centers have been considerably behind those of the previous year. During May 1952 arrivals at Manaus totaled only about 1,656 tons of unshelled nuts compared with about 2,526 tons a year earlier. Arrivals in Belem this May were 2,327 tons compared with 3,188 tons last year. Itacoatiara reports only 72 tons arrived this May compared with 220 last year. According to preliminary figures, arrivals at the export centers for the first 5 months of this season totaled only about 10,715 short tons compared with 18,848 tons for the same period a year ago. The arrivals by ports for this year are not yet available.

Exports during the first 5 months of this season totaled about 2,856 short tons of unshelled and 862 tons of shelled compared with 8,963 tons of unshelled and 1,121 tons shelled for the same period a year earlier. The countries of destination for these exports are not available at this time but the bulk were to the United States. It is reported that an estimated 600 short tons of unshelled remained in the hands of the Trade in Manaus and 1,000 tons in Belem on June 22, 1952.

Considering circumstances, the market in Belem and Manaus during May was reasonably active and steady but was lower than a year ago when a crop twice the size of this year was available. Shellers are reported increasing purchases of medium Tocantins and large Manaus. The export market was improving during May with increased purchases by the United States and United Kingdom buyers. It is estimated that United States importers purchased from 1,100 to 1,650 short tons of unshelled

BRAZIL NUTS: Estimated commercial production in Brazil, 1952 with comparisons

(Rounded to nearest 100 short tons)

Year	Bolivia	Brazil	Total
	Short tons	Short tons	Short tons
Averages:			
1941-50	1,000	19,900	20,900
1946-50	100	27,100	27,200
Annual:			
1945	100	6,800	6,900
1946	100	27,500	27,600
1947	100	30,400	30,500
1948	100	18,900	19,000
1949	200	35,200	35,400
1950	200	23,200	23,400
1951 1/	200	3/ 34,100	3/ 34,300
1952 2/	200	3/ 17,000	3/ 17,200

1/ Preliminary. 2/ Preliminary forecast. 3/ Revised.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, results of office research, Trade and other information.

UNITED STATES: Imports of Brazil nuts

(Crop year, September-August)

Year	Average		Annual		
	1941-42 1950-51	1946-47 1950-51	1949-50	1950-51	1951-52 1/
	Short tons	Short tons	Short tons	Short tons	Short tons
			SHELLED		
Brazil	2,565	3,169	4,198	2,470	2,260
Other	32	11	2	32	23
Total	2,597	3,180	4,200	2,502	2,283
			UNSHELLED		
Brazil	7,193	10,799	10,877	4,579	7,172
Other	5	3	0	14	0
Total	7,198	10,802	10,877	4,593	7,172

1/ 8 months, September through April.

Compiled from official records of the Bureau of the Census.

during May for May/July shipment and 2,000 to 3,500 cases of shelled. United Kingdom buyers are reported to have made some purchases of unshelled at Manaus. They did not purchase in Belem. The tonnage purchased by the United Kingdom in Manaus is not known. They also purchased from 300 to 600 cases of shelled in Manaus. Canadian and German importers purchased a total of 350 to 500 cases of shelled and 375 tons of unshelled.

Exporters are optimistic over the remainder of the season as it is reported United States importers are showing more interest. Recently German and British inquiries were received. Trade agreements are being negotiated with the Netherlands which it is hoped will include Brazil nuts. Representatives from the Amazon Basin are reported in Rio attempting to work out some program with the Brazilian Government to assist exporters of Brazil nuts.

The f.o.b. prices per pound of unshelled paid by United States importers during May 1952 were about as follows: 16 to 17 cents for medium Tocantins; 17 to 18 cents medium Jari and 18 to 22 cents for large Manaus. Shelled were from 53 to 59 cents per pound. Higher prices than those shown above were reported early in the month.

On June 22 the f.o.b. prices per pound were as follows: unshelled 20 to 23 cents and shelled 60 to 65 cents depending on grade, size, etc.--By W. R. Schreiber.

WORLD PRODUCTION OF DAIRY PRODUCTS, FIRST QUARTER, 1952 [1]

Over-all factory production of dairy products declined slightly in the first quarter of 1952 in many of the important producing countries of the world compared with the first quarter of 1951. In many countries, milk production was slightly below the level of the earlier year. Several factors contributed to this decrease, among which were a decline in cow numbers, lower yields, higher feed costs, effects of foot-and-mouth disease, and adverse weather.

Butter production in factories in the opening quarter of 1952 was approximately 6 percent below the corresponding quarter of 1951. Output in Western Germany increased, reflecting the larger proportion of the increased milk production of this quarter that was available for manufacturing because of smaller fluid sales. Lower milk production and diversion of supplies to more profitable dairy products reduced butter output in Denmark, the Netherlands, Switzerland, the United Kingdom, Argentina and Australia. Favorable dairying conditions and increased milk production resulted in higher butter production in New Zealand in the January-March quarter. The higher milk output in Canada was absorbed by butter, while in the United States, continued high fluid milk consumption curtailed supplies of milk for manufacturing and butter production for the quarter was down.

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[1] A more extensive statement will soon be published as a Foreign Agriculture Circular available from the Office of Foreign Agricultural Relations, U. S. Department of Agriculture, Washington 25, D. C.

DAIRY PRODUCTS: Factory output in principal producing and exporting countries, 1st quarter (calendar) 1952, with comparisons

Country and product	Average 1934-38	Total 1951	1951 1st quarter	1951 2nd quarter	1951 3rd quarter	1951 4th quarter	1952 1st quarter	First Quarter 1952/51
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	Percent
Butter								
Canada	1/ 254,774	257,604	25,365	84,815	99,875	47,549	27,138	107
United States	1,673,328	1,214,685	260,235	379,315	349,860	225,275	246,715	95
Belgium	46,179	2/ 74,682	11,918	22,433	24,350	15,981	—	—
Denmark	400,660	3/ 370,593	81,129	112,655	101,191	3/ 75,618	70,988	88
France 4/	5/ 529,000	5/ 584,000	—	—	—	—	—	—
Germany, Western	6/7/ 560,000	3/ 607,980	3/ 116,204	171,611	179,783	3/ 140,382	125,933	108
Ireland	89,400	3/ 72,838	3,326	22,444	32,425	3/ 14,643	3,738	112
Netherlands	201,000	3/ 184,274	32,041	3/ 61,978	56,167	3/ 34,088	5/ 25,312	79
Norway	24,930	24,647	4,630	9,279	3/ 7,683	3,055	5/ 4,186	90
Sweden	152,769	3/ 234,322	49,901	67,965	3/ 69,617	3/ 46,839	5/ 45,110	90
Switzerland 8/	57,760	55,115	9,034	12,308	17,295	16,478	5/ 6,342	70
United Kingdom	44,200	3/ 12,634	3,181	3/ 5,197	3,136	3/ 1,120	5/ 1,671	52
Argentina	65,742	82,452	26,235	24,251	8,818	23,148	20,944	80
Union of South Africa	9/ 27,725	65,867	21,974	14,688	11,978	17,227	—	—
Australia	7/ 415,250	3/ 314,381	3/ 99,966	3/ 47,464	62,032	104.919	72,089	72
New Zealand - total	7/ 366,912	3/ 410,312	3/ 124,768	38,248	73,472	173,824	137,536	110
Export gradings	10/ 322,796	3/ 357,765	119,439	30,618	54,089	3/ 153.619	120,302	101
Cheese								
Canada	1/ 119,924	85,260	5,010	27,197	38,424	14,629	3,880	77
United States	643,234	1,157,560	235,250	379,510	330,125	212,675	225,035	96
Denmark	68,820	3/ 165,124	34,833	3/ 52,470	46,516	3/ 31,305	33,730	97
France 11 /	5/ 584,000	5/ 617,000	—	—	—	—	—	—
Italy 11/	523,518	5/ 613,000	—	—	—	—	—	—
Netherlands	5/ 200,000	3/ 265,257	37,839	87,494	86,390	3/ 53,534	5/ 38,596	102
Norway 12/	39,067	63,929	13,354	21,895	3/ 18,361	10,319	5/ 11,978	90
Sweden	76,059	120,007	29,441	35,902	3/ 33,227	3/ 21,437	5/ 25,349	86
Switzerland 12/	111,729	3/ 116,848	3/ 12,930	31,089	39,220	33,609	5/ 16,428	127
United Kingdom 4/	109,000	3/ 98,516	24,282	34,496	30,240	3/ 9,498	5/ 24,525	101
Argentina	67,873	209,437	59,083	52,911	15,873	81,570	66,138	112
Union of South Africa	9/ 10,195	21,088	6,885	4,339	4,171	5,693	—	—
Australia	7/ 48,400	3/ 93,240	3/ 22,157	3/ 9,909	22,010	39,164	18,554	84
New Zealand - total	7/ 210,911	3/ 226,612	3/ 75,488	26,356	32,704	92,064	71,456	95
Export gradings	10/ 204,110	3/ 224,411	81,570	38,221	17,881	3/ 86,739	72,809	89

Canned milk								
Canada 13/	1/ 104,335	327,844	44,029	120,531	110,213	53,071	48,399	110
United States 13/	2,469,535	3/ 3,966,350	3/ 849,685	1,396,225	1,084,025	636,415	746,375	88
Cuba	14/ 32,564	45,192	5,544	8,820	18,102	12,726	—	—
Denmark	40,785	—	—	—	—	—	—	—
France	15/ 28,953	—	—	—	—	—	—	—
Netherlands	309,952	3/ 394,822	87,726	116,341	98,180	3/ 92,575	5/ 98,253	112
Switzerland	14,198	—	—	—	—	—	—	—
United Kingdom	378,560	3/ 176,512	30,823	3/ 97,395	3/ 33,062	3/ 15,232	5/ 26,092	85
Australia	7/ 41,894	3/ 149,601	3/ 38,276	20,418	30,989	3/ 59,918	31,212	82
New Zealand	14/ 11,273	—	—	—	—	—	—	—
Dried milk 16/								
Canada	1/ 26,079	69,409	7,710	22,664	25,146	13,889	9,006	117
United States	14/ 203,555	3/ 826,605	3/ 178,125	314,180	220,950	113,350	186,720	105
Belgium	5,500	17,147	936	3/ 7,272	7,018	1,921	—	—
Denmark	2,205	—	—	—	—	—	—	—
France	15/ 7,685	—	—	—	—	—	—	—
Netherlands	56,438	3/ 75,432	7,379	30,806	27,039	3/ 10,208	5/ 11,642	158
Sweden	1,351	17,756	5,691	5,178	3/ 4,279	3/ 2,608	—	—
Switzerland	7,187	—	—	—	—	—	—	—
United Kingdom	43,098	3/ 50,086	7,437	27,238	11,917	3/ 3,494	5/ 9,527	128
Australia	7/ 16,971	57,013	13,156	4,538	12,704	26,615	13,901	106
New Zealand	17/ 17,429	—	—	—	—	—	—	—

1/ Average 1935-39. 2/ Total production in 1951 is estimated at 169,476,000 pounds. 3/ Revised. 4/Total production. 5/ Estimated. 6/ Average 1935-38. 7/ Production year ending June 30. 8/ Total butter, and includes butter made from the milk of sheep and goats. 9/ Production year ending August 31. 10/ Marketing year ending July 31. 11/ Total cheese, and includes cheese made from the milk of sheep and goats. 12/ Total cheese and includes cheese made from the milk of goats. 13/ Both bulk and case goods. 14/ Less than a 5-year average. 15/ For 1937. 16/ Total dried-whole and dried-skim milk for human consumption. 17/ For 1938.

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics, U. S. Foreign Service reports, and other information.—June 30, 1952.

Over-all cheese output in the first quarter of 1952 was 3 percent below comparable 1951. Gains were reported in the Netherlands, Switzerland and the United Kingdom, where cheese plants continued to receive a large portion of the milk alloted to the manufacturing of dairy products. In other European countries, the output of cheese declined, largely due to decreased milk production. A substantial increase in cheese production at the expense of butter occurred in Argentina, but in New Zealand the reverse occurred. In Australia, the decrease in cheese was relatively less than that for butter. Production declined in both Canada and the United States.

Canned milk production declined approximately 10 percent in the first 3 months of 1952 compared with the same months a year earlier. The Netherlands and Canada were the only countries in which canned milk output continued well above the 1951 level. Significantly smaller quantities were produced in the United Kingdom and Australia. Production in the United States declined, due to the sharp drop in the output of evaporated milk.

Total dried milk production in the January-March quarter of 1952 was up 8 percent over the corresponding quarter of 1951. A substantial increase in dried whole milk output accounted for the marked rise in over-all dried milk production in the Netherlands whereas in Australia, Canada and the United States, the rise was attributed to the heavier production of nonfat dry milk solids.

Prospects for milk production in most European countries in 1952 appear to be somewhat better than they were in the first quarter, with the possible exception of those countries affected by foot-and-mouth disease. Milk production in Argentina, New Zealand and Canada probably will exceed that of 1951, while in Australia and the United States, it is expected to be somewhat below that of a year ago.

By Regina M. Murray, based in part upon U.S. Foreign Service reports.

COMMODITY DEVELOPMENTS

LIVESTOCK AND ANIMAL PRODUCTS

UNION OF SOUTH AFRICA DROUGHT AFFECTING DAIRY PRODUCTION MORE THAN POULTRY AND EGGS

Dairy Products

The serious drought which extended through most of the past summer, (October-March) in the Union of South Africa sharply reduced the corn crop and left pastures in poor condition, according to C.H. Marks and J.L. Dougherty, American Embassy, Pretoria. Stocks of butter and cheese are less than usual and exports of dairy products during 1952 have been restricted until a significant improvement in the manufactured dairy products position can be established.

Fluid milk supplies in early 1952, already slightly below normal throughout the Union, were noticeably short in the denser urban sections of the Johannesburg area, and milk rationing is likely in the cities during the current winter (April-September). Short supplies and high prices of feed relative to those for milk are resulting in some liquidation of dairy herds, and some consideration may be given to increasing dairy returns.

The Dairy Industry Control Board, which already regulates the disposition of most processed dairy products, is now proposing a plan to control the utilization of all milk in established milksheds. The Board would require that all raw milk, not sold to a milk distributor for fluid distribution as milk or cream, be pooled for disposition in such manner and at such prices as the Board deems fit. Some opposition to the proposal has been reported.

Production of dairy products in 1951 had reached an all time record. Creamery butter production in the Union totaled nearly 66 million pounds, an increase of 10 percent over 1950. Most of the butter exports, amounting to about 5 million pounds, a new record, were shipped to other African and nearby markets. Rhodesia (Southern and Northern), Belgian Congo, Mozambique and Israel accounted for about 80 percent. Exports to Europe (United Kingdom and Italy) amounted to barely 200,000 pounds or less than 4 percent of the total.

Cheese production, most of it cheddar and gouda types, amounting to over 21 million pounds in 1951, represented an increase of 2.5 percent over a year earlier and a new record. Exports totalling 594,000 pounds were shipped mostly to other markets of Africa. Production of condensed and dry whole milk in 1951 were also large relative to earlier years, with nearly all exports going to African markets.

Poultry and Eggs

In spite of the drought, the production of poultry and eggs in 1952 may not be much less than the relatively high rate of 1951. The shortage of corn is being largely overcome by the feeding of kaffircorn, barley and other feed grains which were not as seriously affected by the drought. This may permit a continuation of heavy exports of shell eggs to the United Kingdom, the Union's largest market for eggs.

GRAINS, GRAIN PRODUCTS AND FEEDS

AUSTRALIA'S WHEAT PROSPECTS

Prospects for Australia's 1952-53 wheat crop now vary widely, with most favorable conditions reported for New South Wales, Victoria, and Queensland and less favorable conditions in South Australia and Western Australia. Seeding of the crop is now being completed in most areas and no significant increase over last season's small harvested wheat acreage is expected. The 1951-52 wheat acreage harvested was 10.4 million acres in contrast with the Government's 5 year goal of 14 million acres.

On a regional basis, the best increase in acreage this year is reported for Queensland, where timely rains in April and May favored seeding. Northern New South Wales also had satisfactory seeding weather, but in the central west and Riverina areas too much rainfall delayed preparation of the land and seeding. This also encouraged weed growth. Weather conditions were favorable in Victoria and seeding progressed rapidly until held up by heavy rains in late May. Early seeded crops are off to a good start. Weed growth is also reported heavy.

In South Australia, where wheat acreage has been decreasing, a further reduction is reported especially in the southeast. Western Australia's acreage will depend on the receipt of needed rainfall as most of the wheat area was still very dry in mid-June.

The supply of wheat available for use during the year ended November 30, 1952 is now estimated to be about 181 million bushels, 47 million bushels less than the total supply for the previous year, that is the year ended November 1951. The current supply was made up of the crop, now estimated at 161.4 million bushels and a carryover of 19.5 million. Prospective domestic consumption is placed at 75 million leaving only 106 million bushels available for export and carry-over. It thus appears that despite reduced domestic consumption, export availability has been reduced by about 40 million bushels.

In recognition of this situation the International Wheat Council early in May reduced Australia's wheat quota for the marketing year ending July 1952 from the original figure of 88.7 million bushels to 72 million. Exports through April 11, 1952 totaled 76.1 million bushels. Of this amount, 65.2 million bushels had been sold under the Agreement and 10.9 million outside the Agreement. It is noted that a significant part of the sales on the free market were made before the small size of the 1951-52 crop was known.

The price of wheat for home consumption for the 1951-52 crop is the equivalent of $1.12 per bushel. This is the rate for wheat for human consumption in all States and for livestock feed in Western Australia. The price for livestock feed in other States is the equivalent of $1.35 per bushel. The latest quotation for export wheat outside the Agreement was $2.42 per bushel for fair average quality wheat, f.o.b. basis.

IRAN EXPECTS ABOVE-AVERAGE WHEAT CROP

The 1952 wheat crop in Iran is forecast at 77 million bushels, according to information available to the Office of Foreign Agricultural Relations. A crop that size would be above average and somewhat above the comparatively small 1951 harvest.

The present outlook is better than earlier season prospects indicated. Shortage of rain up to the end of March, combined with unusually warm weather made the outlook unfavorable as normally no rainfall is expected after that time. This year, however, rains and cooler weather in early May favored grain development especially in central and northern areas. It now appears that very good crops of all grains will be harvested in these areas. In Azerbaijan Province, the most important grain producing region, the outlook is generally the best for a number of years. Heavy snowfall in mountainous regions, adding to the supply of irrigation water, was another favorable factor.

Stocks of wheat and barley remaining from the 1951 crop were running very low early in June. To allay any panic resulting from this shortage, the government announced that a quantity of grain already harvested in southern Iran would be moved to centers where shortages threatened. It is believed that the current crop will cover domestic requirements and there will be no necessity to import grain this season.

ECUADOR'S 1952 RICE CROP PERMITS INCREASE IN EXPORTS 1/

The 1952 rice production of Ecuador is estimated at 230 million pounds of rough rice, an increase from the 212 million pounds harvested in 1951, according to J.L. Martinez, Agricultural Economics Officer, Guayaquil. The current harvest, mainly from May through August, is larger than had been previously expected.

Total export supplies available during 1952 from this harvest, together with stocks from old-crop rice, are estimated at from 75 to 95 million pounds of milled rice, or approximately 85 million pounds. The Ministry of Economy on May 17 issued Resolution No. 158 annulling No. 128 of April 24 (see Foreign Crops and Markets, May 19, 1952) and modifying the terms under which the exportation of 500,000 quintals (50.7 million pounds) may be exported.

The May 17 decree provides that the specified quantity be exported during the months May, June, July, and August 1952, thus enabling exporters to ship some rice from the 1951 carry-over. The April 24 decree provided that exports were to be made from "the so-called 1952 winter crop harvested during the months of June, July, and August."

1/ A more extensive statement will soon be published as a Foreign Agriculture Circular available from the Office of Foreign Agricultural Relations, U.S. Department of Agriculture, Washington 25, D. C.

FRENCH NORTH AFRICA'S GRAIN OUTLOOK FAVORABLE

The outlook for the 1952 grain crop in French North Africa is very promising especially in Tunisia and Algeria, where present prospects are better than were expected earlier in the season. Unusually favorable weather during May is largely responsible for the improved outlook. For the area as a whole a sizable surplus of barley and hard wheat is forecast but some deficit of soft wheat is in prospect.

The situation in Algeria was so good in mid-June that preliminary estimates place the grain crop 60 percent above the below average 1951 crop. This would be a record outturn. Wheat production, tentatively set at 47 million bushels, is significantly above the May forecast and compares with the 1951harvest of about 33 million bushels. The larger part of the increase over last year's crop is in hard wheat, which is forecast at 34 million bushels. Soft wheat at 13 million bushels compares with 9 million a year ago.

Barley, the second grain of importance in Algeria is forecast at 47 million bushels, compared with 26 million in 1951 and the prewar average of 33 million bushels. It is noted that while prospects for large grain harvests seem well established, any extended period of sirocco could change the outlook materially.

Grain harvesting in French Morocco was impeded by heavy rainfall in May. The barley harvest was completed in early June, however, and yields were reported excellent. Yields for soft wheat were said to be average and those for hard wheat extremely variable from one region to another. Official estimates are not yet available, but trade sources predict that wheat production will be up from that of a year ago but total grain production will not vary significantly from the 1951 total.

Latest information from Tunisia was very favorable with indications that the major grains would approach the bumper crop of 1949. The season was early this year and good outturns seemed assured at latest report, though harvests in northern areas had not yet begun.

FATS AND OILS

WHALE OIL SALES LAG

Latest indications are that some 78,000 short tons of whale oil from the 1951-52 Antarctic production still remains unsold. According to trade information available to the Office of Foreign Agricultural Relations, Norway recently sold 44,800 tons of whale oil to Germany, the Netherlands and France at £72-10-0 per long ton ($181.25 per short ton). In addition, 33,600 short tons of Norwegian whale oil are under option for sale to domestic hardeners with no price yet determined. Quantities of whale oil remaining entirely uncommitted are approximately as follows: Norwegian - 22,000 tons; Japanese - 33,000; Panamanian - 15,000; and Argentine - 8,000 tons. See Foreign Crops and Markets of May 19, 1952, page 455, for previous sales.

BURMA'S OILSEED PRODUCTION COMPARES FAVORABLY WITH PREWAR

Burma's oilseed production in 1951-52 was substantially above that of recent years and compared favorably with prewar output, reports J. H. Boulware, Agricultural Attache, Rangoon. Moreover, current indications are that acreage of oilseed crops for 1952-53 will be significantly above that of last year. Conditions of law and order have improved in the producing districts and continued favorable prices for edible oils provide an incentive for increased production.

The 1951-52 production of peanuts, the most important oilseed in Burma, amounted to 198,000 short tons compared with 162,000 in 1950-51 and the 1936-40 average of 200,000 tons. Sesame production was reported at about 54,000 tons against 44,800 the previous year and the prewar average of 56,670 tons. The increase in the production of both crops was explained to some extent by a small increase in planted acreage, but the major factors were the much smaller acreages abandoned and higher per-unit yields.

On the basis of the production of lint cotton, total cottonseed production in Burma in 1951-52 is estimated by the Office of Foreign Agricultural Relations at 20,000 tons, or the same as in 1950-51 but considerably less than half the prewar figure of 54,000 tons.

Probably the primary factor in restoring acreage and production of the oilseed crops is price. As a result of low imports of peanut oil from India in recent years, the demand for edible oils has been heavy with resultant high prices to farmers. Another important factor has been the necessity for areas held by insurgents to be self-sufficient in oils. While peanut cultivation in the vicinity of Myingyan has been severely hampered by the insurrection, the Government program to increase production in the delta has been quite successful. Under this program the Government purchases seed in the Mandalay area in September and October, transports it to the delta and sells it to farmers for planting in October and November. This procedure is made necessary by the climate of the delta where peanuts grown in the dry season cannot be stored through the rains for planting during the coming year.

No information to indicate a significant change in the production of other oilseed crops--coconut, rape, mustard and tung--has been reported later than that published in Foreign Crops and Markets, November 5, 1951.

Data on consumption and stock levels are not available. However, it appears from increased availability and reduced prices that overall consumption in 1952 probably will be slightly above that of 1951-possibly in the neighborhood of 80,000 to 90,000 tons.

During October 1951-March 1952, imports of edible oils amounted to 11,870 tons compared with 20,380 tons during the 1951 fiscal year (October 1950-September 1951). Oil imports have continued under Open General License. The absence of import restrictions and the 5-year trade agreement with India, which provides for 8,000 long tons of Indian peanut oil yearly, have resulted in a stepped-up rate of imports.

Burma's exports of oilseeds and vegetable oils are comparatively negligible. Prior to 1940, oil cake was a significant export item and such exports increased during the past year. During calendar year 1951 exports totaled 24,080 tons compared with 6,720 in 1949-50 and about 90,000 in 1938-39.

A Burmese Mission recently returned from Japan and reported favorably on the extraction of oil from rice bran. While plans have not been fully formulated, the Government has indicated that it probably will wish to begin the production of rice bran oil. If a plant should be established, it is believed that at least 200,000 tons of bran could be obtained annually for processing.

NEW HEBRIDES COPRA PRODUCTION EXPECTED TO DROP FROM RECORD HIGH

Copra production in New Hebrides in 1952 is expected to drop to around 20,000 short tons from an all-time high of 30,585 tons in 1951, reports B. I. Hyman, American Consulate, Noumea, New Caledonia. The estimated decrease is attributed to the sharp drop in producer prices in 1952 - from 8,250 francs CFP per metric ton ($118 per short ton) in January to 6,000 francs ($86) by May--and the severe damage inflicted on some islands by a hurricane in December 1951. Output for the first quarter of 1952 was 10,670 tons, all of which was exported to France.

The 1951 record production was stimulated by abnormally high prices and indicates the production potential of New Hebrides given good prices, improved care of plantations, and sufficient labor. One reliable commercial source estimates this potential to be at least 30 to 50 percent above 1951 output.

Two-thirds of the current production is from native plantations and one-third from European, predominately French. Production of both groups, but particularly that of native growers, is governed strongly by prevailing prices. Because of labor shortages, no concerted and few individual efforts have been undertaken to improve conditions of neglect on plantations and to reduce the large quantity of coconuts lost each year in the tropical under-brush.

There is no consumption of copra in the New Hebrides, but one firm hopes to begin the operation of a small mill within the next 2 months. The plant can accomodate 4 metric tons of copra per day from which an estimated 2.5 tons of crude oil and 1.5 tons of coconut meal will be produced.

Copra is the foremost trade commodity of the New Hebrides by both quantity and value and France purchases all or the major portion of the exports.

TOBACCO

FRANCE'S TOBACCO PRODUCTION, AND EXPORTS SLIGHTLY LOWER: IMPORTS, MANUFACTURE AND SALES HIGHER

France's 1951 tobacco production is preliminarily estimated at slightly below the 1950 leaf crop, according to O. W. Herrmann and M. M. Riguad, American Embassy, Paris. Imports of unmanufactured tobacco during 1951 were 51 percent higher than 1950. Exports of tobacco and tobacco products during 1951 were slightly lower than 1950. Manufacture of tobacco products during 1951 increased 10 percent over the 1950 output. Sales of tobacco products during 1951 increased 2 percent above 1950.

Preliminary estimates of leaf production for France during 1951 (farm sales weight basis) are 116.8 million pounds from 68,300 acres. This compares with a revised estimate of 117.5 million pounds from 71,000 acres during 1950. Yield per acre during 1951 is placed at 1,710 pounds as compared with only 1,654 pounds in 1950.

Imports of leaf tobacco during 1951 totaled 69.7 million pounds as compared with 46.1 million pounds in 1950. Algeria continued to be the most important leaf source in 1951, supplying 21.0 million pounds. The United States ranked second, with 10.7 million pounds; Greece, third, with 10.5 million pounds; Yugoslavia, fourth, 8.2 million; Madagascar, fifth, 7.6 million; and Turkey, sixth, 4.9 million pounds. The remaining 6.8 million pounds were supplied in varying quantities by numerous countries including: Italy, Hungary, Western Germany, Brazil, Paraguay, Columbia, Camerooms, French West Africa and French Equatorial Africa. In addition to leaf tobacco, France also imported 2.4 million pounds of tobacco products, of which cigarettes constituted 2,271,620 pounds; cigars, 71,429 pounds; smoking tobacco, 57,761 pounds, and snuff, 15,432 pounds.

France exported a total of 1.2 million pounds of tobacco and tobacco products during 1951 as compared with 1.3 million pounds in 1950. Of the total 1951 exports, leaf constituted 136,685 pounds, 77 percent of which went to Switzerland and 23 percent to Belgium-Luxembourg. The 1951 exports also included 1,170,642 pounds of cigarettes, 36,155 pounds of smoking tobacco, and 3,307 pounds of cigars.

Manufacture of tobacco products during 1951 totaled 128.4 million pounds as compared with 116.6 million pounds in 1950. Of the total products manufactured, cigarette production constituted 77.6 million pounds, or 60 percent, cut tobacco, 46.7 million pounds, or 36 percent. The remaining 4.1 million pounds was made up of cigars, cigarillos, snuff, and chewing tobacco. Sales of tobacco products during 1951 were reported at 124.3 million pounds as compared with 121.0 million pounds in 1950. Of this total, legal cigarette sales were reported at 76.1 million pounds, according to the French Tobacco Monopoly. During 1950, cigarette sales were reported at 70.3 million pounds. Of the total cigarettes legally sold, United States brands made up about 1.3 million pounds.

COTTON AND OTHER FIBER

COTTON-PRICE QUOTATIONS ON WORLD MARKETS

The following table shows certain cotton-price quotations on world markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, U.S. gulf-port average, and taxes incident to exports

Market location, kind, and quality	Date 1952	Unit of weight	Unit of currency	Price in foreign currency	Equiv. US¢ a lb.	
					Spot quotation	Export & intermediate taxes
Alexandria		Kantar				
Ashmouni, FG	6-26	99.05 lbs.	Tallari	82.00	47.25	-----
Ashmouni, Good	"	"	"	70.00	40.33	-----
Ashmouni, FGF	"	"	"	63.50	36.59	-----
Karnak, FG	"	"	"	140.00	80.67	-----
Karnak, Good	"	"	"	107.00	61.65	-----
Karnak, FGF	"	"	"	72.00	41.49	-----
Bombay		Candy				
Jarila, Fine	"	784 lbs.	Rupee	1/ 700.00	18.61	10.64
Broach Vijay, Fine	"	"	"	2/ 810.00	21.54	10.64
Karachi		Maund				
4F Punjab, SG, Fine	6-25	82.28 lbs.	"	3/ 88.00	32.27	13.85
289F Sind, SG, Fine	"	"	"	3/ 93.00	34.10	13.85
289F Punjab, SG, Fine	"	"	"	3/ 96.00	35.20	13.85
Izmir		Kilogram				
Acala I	6-26	2.2046 lbs.	Kurus	Holiday		-----
Acala II	"	"	"	"		-----
Adana						
Acala I	"	"	"	"		-----
Lima		Sp. quintal				
Tanguis, Type 3-1/2	6-24	101.4 lbs.	Sol	500.00	31.42	7.85
Tanguis, Type 5	"	"	"	467.00	29.35	5.73
Pima, Type 1	"	"	"	600.00	37.71	12.35
Recife		Arroba				
Mata, Type 4	6-26	33.07 lbs.	Cruzeiro	3/ 310.00	51.00	2.4% ad valorem
Sertao, Type 4	"	"	"	4/ 355.00	58.41	
Sao Paulo						
Sao Paulo, Type 5	"	"	"	295.00	48.53	3.0% ad valorem
Torreon		Sp. quintal				
Middling, 15/16"	"	101.4 lbs.	Peso	253.00	28.84	5.51
Houston-Galveston-New Orleans av. Mid. 15/16	"	Pound	Cent	XXXXX	39.43	-----

Quotations of foreign markets and taxes reported by cable from U.S. Foreign Servic posts abroad. U.S. quotations from designated spot markets.

1/ Reported 700.00 to 725.00 (19.28). Ceiling 820.00 (21.81).
2/ Reported 810.00 to 830.00 (22.07). Ceiling 925.00 (24.60).
3/ Nominal.
4/ Seller.

1951-52 WEST GERMAN COTTON IMPORTS RUNNING ABOVE 1950-51

Imports of cotton into Western Germany during August 1951 through March 1952, the first 8 months of the 1951-52 season, totaled 664,000 bales (of 500 pounds gross), 2 percent above the 651,000 bales imported during the corresponding period of 1950-51, according to Joseph Radford, Jr., Vice Consul, American Consulate General, Bremen. Thus far during the current season, 348,000 bales have originated in the United States, compared with the 330,000 bales imported from this country in the same months of 1950-51. About 102,000 bales were imported from Turkey this season, 60,000 bales from Brazil, and 45,000 bales from Egypt. In this period of 1950-51 about 158,000, 9,000, and 69,000 bales, respectively, were imported from these 3 sources.

German cotton spinners have shown increased interest during the current season in cotton from Uganda and other countries of British East Africa, which has been substituted in part for certain types of Egyptian cotton because of lower prices. The fact that India and the United Kingdom have not taken up their allotment of Uganda cotton this season has resulted in larger supplies available to other countries and at lower prices. During the first 8 months of the current season Western Germany had imported 18,000 bales from British East Africa compared with only 800 bales during the same months of 1950-51.

In recent months German cotton spinners have delayed purchasing of raw cotton or have kept purchases at a minimum in view of the depressed market for cotton textiles. Several million dollars of the $50 million Export-Import Bank credit to Germany for purchase of United States cotton had not been utilized by German spinners at the end of April. Similarly it was reported that only about 15 percent of the initial allocation of $3-1/2 million for purchase of Brazilian cotton was utilized by German cotton spinners before it expired on April 30, 1952. Imports during the 1951-52 season are expected nevertheless to total nearly a million bales, compared with total imports in the preceding season of 935,000 bales.

Consumption of cotton in West German spinning mills amounted to 686,000 bales during August 1951 through March 1952, about 4 percent less than the 713,000 bales consumed during the same months of the 1950-51 season. Monthly consumption has declined steadily from 98,000 bales in January 1952 to 82,000 in March. Production of cotton yarn decreased proportionately from 65 million pounds in January 1952 to 54 million pounds in March. During the same months of 1951 yarn production increased slightly from 57 to 59 million pounds, respectively. There have been no signs of any improvement in the demand for cotton yarn as the spring months passed. Yarn production statistics for April and subsequent months are not expected to show any increase above the March figure and may well show a further decrease.

CURRENT OUTLOOK FOR 1952-53 EGYPTIAN COTTON CROP; FINAL ESTIMATE 1951-52 CROP

The outlook for the 1952-53 Egyptian cotton crop at the present time is for some reduction in acreage, according to the American Embassy, Cairo. Although no official estimate of cotton area has been issued as yet, the acreage for the coming crop has been privately forecast at about 1,900,000 acres, compared with the 2,055,000 acres harvested in 1951-52. Water for irrigation, particularly in Lower Egypt, has been barely adequate thus far for the 1952-53 crop, and cool weather was detrimental to young plants earlier in the season. Rather severe attacks by caterpillars have necessitated some replanting. Attacks by other insects have been relatively mild, with energetic measures being taken by the growers to prevent any serious damage.

The final official estimate of the 1951-52 crop, recently released, showed a production equal to 1,666,000 bales of 500 pounds gross, somewhat above the previous official estimate, issued in December 1951, of a crop of 1,579,000 bales. Production in 1950-51 amounted to 1,754,000 bales.

The increase in the final 1951-52 total crop estimate over the December 1951 figure was largely accounted for by an 81,000-bale increase in the estimate of the extra long-staple cotton varieties of Karnak and Menoufi (over 1-3/8-inch staple) from 562,000 bales to 643,000 bales. Estimates of the other staple lengths changed very little, with production of the medium-long staple (1-3/8 to 1-1/2-inch) cotton, mostly Giza 23 and Giza 30, shown as 257,000 bales and the shorter staple varieties of Ashmouni and Zagora (1-1/8 to 1-3/8-inch) estimated at 717,000 bales. Production of 49,000 bales of scarto (linters and ungraded cotton) completed the 1,666,000-bale total.

Exports of cotton from Egypt during the first 8 months of 1951-52 amounted to 644,000 bales, only about one-half the 1,281,000 bales exported during the corresponding period of 1950-51. The 5 most important destinations of Egyptian cotton exports thus far during the current season are India, Italy, France, the United States, and the United Kingdom, the same countries that led in 1950-51. With the exception of France, considerably less cotton has been shipped to each of these countries this season than last. Outstanding has been the decline in exports to the United Kingdom from 345,000 bales during the first 8 months of 1950-51 to only 68,000 bales in the same period of 1951-52. Exports to the United States decreased from 132,000 bales during August-March 1950-51 to 79,000 bales in the same months of the current season.

More recent unofficial statistics show total exports from August 1951 through May 28, 1952, or for approximately 10 months of the season, as 762,000 bales, still about one-half the 1,454,000 bales exported during the first 10 months of 1950-51. Exports to France in this period of 1951-52, according to this source, totaled 101,000 bales, to India 99,000, Italy 96,000, and the United Kingdom 69,000. There was no increase in exports to the United States over the 8-month figure of 79,000 bales.

The Egyptian Government hoped to stimulate cotton exports by the elimination of the export tax of LE 8 per 100 kilos (equivalent to 11.5 U.S. cents a pound) on contracts concluded between May 19, 1952, and the end of the current Egyptian season on August 31, 1952. Also excluded from payment of the export tax were registered contracts concluded prior to May 19 with actual shipments occurring between that date and August 31. Some additional interest has been shown in Egyptian cotton since this action took place, but it is unlikely that the entire exportable surplus will leave the country by the end of the season. Under the current price-support program the government will purchase all cotton offered for delivery in July and August at prices based on 125 tallaris per cantar (72.25 cents a pound) for Good Karnak and 72 tallaris (41.62 cents) for Good Ashmouni. After September 1 the export tax will be reimposed on new-crop cotton but at a lower level than that prevailing before May 19. The new level for Karnak will be LE 6 per 100 kilos (about 8.63 cents a pound) and for other varieties LE 4 per 100 kilos (about 5.75 cents a pound). The government is expected to float a loan in the near future to carry out the support program as was done in previous years of cotton-price supports.